

**FIG. 1**

10

Universal Dynamics
My Site Site Settings Help

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting
Powered By AUTHORIA

Awarding a bonus
20

All sources

Shelley Moore - Product Manager

Manager Advisor

• Plan

• Deploy

• Manage

• Evaluate

• Reward

• Authoring

• Publishing

• Administrati...

• Reporting

Actions

Add Listing

Create Subarea

Upload Document

Change Settings

Manage Users

Manage Content

Manage Portal Site

Edit Page

19
20

Manager Advisor

Highlights

Actions

Tips

TABLE OF CONTENTS

• Company philosophy
22

• Policy snapshot

• Manager's role

• Legal considerations

Company philosophy

A competitive compensation program can enhance the company's ability to attract, motivate and retain the highest caliber talent. As performance is closely tied to compensation and other rewards, an effective bonus program recognizes employee contribution and encourages a high performance culture.

Related Information
 Understanding the compensation program
26

Back to top ↑

Policy snapshot

Our bonus plan is designed to motivate employees and reward individuals responsible for the overall success of the business.

Reviews are conducted semi-annually, in June and December. The associated bonuses are payable July 15th and December 15th.

The following criteria are used to determine whether a bonus is awarded:

employee's individual performance against established goals

the performance of the company as a whole

relative performance contribution to the business (contribution level compared with peers and associates)

the amount of bonus budget available to the department

Budget

The salary committee determines the bonus budget.

The bonus budget this year is 5% of base compensation.

Senior management communicates the bonus budget to managers.

Bonus recommendations should not exceed the budget for the department.

Back to top ↑

Manager's role

It is your responsibility to:

- determine whether employees should receive a bonus award
- evaluate each employee fairly, based on clear, written objectives
- use the evaluation as a basis for bonus recommendations
- recommend bonus awards to Human Resources in a timely manner
- communicate the approved bonus award to each employee

Guidelines

Keep bonus award recommendations within the budget for the department.

Document performance successes and failures that may affect an employee's bonus.

Provide performance feedback and explain the link between performance and bonus amounts.

Ensure that your top performers are being rewarded appropriately.

Resources

Compensation Philosophy Manual

bonus policy

Back to top ↑

Legal considerations

Clear and accurate communication of employee salary-related information, including increases and other rewards, must be conducted in a non-discriminatory manner. All compensation information must be treated as highly confidential

Back to top ↑

All information on this Web site is subject to applicable laws and regulations described in the plan documents and other legal provisions. The material provided here is for informational purposes only. If there is any discrepancy, the plan documents govern.

I have read this page and understand the content

Acknowledge
24

FIG. 2

Universal Dynamics
My Site Site Settings Help

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting
Powered By AUTHORIA

 Understanding the compensation program
All sources
Shelley Moore - Product Manager

Manager Advisor
Highlights Actions Tips

• Plan  
• Deploy  
• Manage  
• Evaluate  
• Reward  
• Authoring  
• Publishing  
• Administrati...  
• Reporting
48

Actions
32

Add Listing  
Create Subarea  
Upload Document  
Change Settings  
Manage Users  
Manage Content  
Manage Portal Site  
Edit Page
36

34
Back to top ↑

19
30

48
32

36
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19

 **Universal Dynamics** My Site Site Settings Help

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting Powered By AUTHORIA

 **Awarding a bonus - Actions** All sources    Shelley Moore - Product Manager

**Manager Advisor**

- Plan
- Deploy
- Manage
- Evaluate
- Reward
- Authoring
- Publishing
- Administrati...
- Reporting

**Actions**

- Add Listing
- Create Subarea
- Upload Document
- Change Settings
- Manage Users
- Manage Content
- Manage Portal Site
- Edit Page

**Highlights** **Actions** **Tips**

**TA B L E O F C O N T E N T S**

- Milestones
- Tasks
- Preparation

**Milestones**

In the table below, you will find a listing of critical milestones to meet as you award a bonus:

Milestones	Key dates
Human Resources conducts a bonus kick-off meeting.	November 3 and June 4
Distribute Self-assessment Form to all employees.	November 15 and June 15
Collect Self-assessment Forms.	November 20 and June 20
Complete a Goals Results Form for each employee.	November 20-25 and June 20-25
Submit initial bonus award recommendations to your department head and Human Resources for approval.	November 27 and June 28
Schedule a meeting with each employee to review performance and obtain a signed Goals Results Form.	December 1 and July 1
Communicate approved bonus awards to each employee.	December 15 and July 15
Bonuses are payable.	December 20 and July 20

[Back to top ↑](#)

**Tasks**

When you award employees a bonus, you must:

- distribute to and collect from each employee a Self-assessment Form
- review employee performance as measured against goals
- complete a Goal Results Form for each employee
- submit initial recommendations to your department head and Human Resources to obtain approval for any proposed bonus awards
- schedule a meeting with each employee to review results
- provide Human Resources with the final Goal Results Form, signed by you and the employee
- communicate the approved bonus award to each employee

**Determining the appropriate bonus amount**

To determine the appropriate bonus amount for each employee, you should:

- measure the employee's progress against goals
- provide a percentage for "goal accomplished"
- calculate the total individual objective as a percentage
- compare the total individual objective percentage against the employee's bonus opportunity

**Providing above average bonuses to top performers**

If you feel that certain employees performed significantly better than others and deserve additional rewards, consider increasing their bonus award. To do this, you must:

- be sure the total bonus percentage is still within budget for your department
- obtain approval from your department head if the bonus is beyond the established range for an employee
- be prepared to document how the employee's performance and current responsibilities warrant the additional award

**Providing no bonuses to poor performers**

If you feel that certain employees did not perform up to standard, you may choose not to award them a bonus. Remember, bonuses are not guaranteed and are a reflection of an employee's performance. The decision not to award a bonus can be an appropriate and effective motivational tool.

If you do not award a bonus to an employee, be sure to:

- document the reasons why the employee should not receive a bonus (e.g., the employee is rated 2.5 or below)
- clearly explain what the employee needs to do going forward to improve performance
- enter zero dollars as a recommended bonus amount

To make bonus recommendations, use the Compensation management system.

[Back to top ↑](#)

**Preparation**

To assist you in preparing for awarding a bonus, you may want to review:

- total compensation for each employee
- job grades and bonus opportunities
- annual budget

[Back to top ↑](#)

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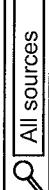
FIG. 4

 **Universal Dynamics**

Manager Advisor Home Plan Manage Deploy Evaluate Reward Your direct reports

Powered By  
AUTHORIA 

 **Your direct reports**

All sources   Customer 02 - Director, Customer Operations

Manager Advisor Home

- Plan
- Manage
- Deploy
- Evaluate
- Reward

**Job Details**

Employee ID	Name	Job Title	Performance Rating	Last Increase Date	Phone
EXTcust04	Customer 04	Team Lead, CCE	Unsatisfactory	1/1/2004	
EXTcust05	Customer 05	Team Lead, CCE	Exceeds Expectations	1/1/2004	

**Vacation/Sick Time**

Employee ID	Name	Personal Time	Vacation Time	Sick Time
EXTcust04	Customer 04	11	17	19
EXTcust05	Customer 05	20	22	34

**Training Summary**

Employee ID	Name	Training Course	Grade
EXTcust04	Customer 04	Conflict resolution for customer service	Passed
EXTcust05	Customer 05	Conflict resolution for customer service	Passed

**FIG. 5**

**Universal Dynamics** My Site Site Settings Help  
 Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting Powered By AUTHORIA

**Authoring** 52 50 66

**Current Location**

- Manager Advisor
- Authoring
- Authoring**
- Help

**Actions**

- Create Subarea
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

Maintain event content

- Aligning with corporate goals
- Assessing your current organization
- Awarding a bonus
- Creating a career development plan
- Creating a performance improvement plan
- Conducting a performance review
- Creating a staffing plan
- Creating a succession plan
- Developing a salary plan
- Driving performance improvement
- Giving a salary increase
- Granting stock options
- Hiring an employee
- Identifying your optimum organization
- Managing a change in employee status
- Managing a complaint
- Managing a leave of absence
- Managing a reduction in force
- Managing a resignation
- Managing attendance
- Managing ongoing performance
- Managing the feedback process
- Onboarding an employee
- Promoting an employee
- Recruiting an employee
- Setting goals and objectives
- Staffing a position
- Terminating an employee
- Understanding the compensation program

Maintain configuration

- Type Name
- Contact roles
- Employee groups
- Event types
- Links
- Substitution variables
- System variables

Maintain home page content

- Type Name
- Home page content

Maintain index pages content

- Type Name
- Index pages content

Maintain employee summary page design

Contacts

Last Name First Name Business Phone E-mail Address

There are no items to show in this view of the "Contacts" list. To create a new item, click "Add new item" below.

Add new item

Maintain pictures

Maintain resources

FIG. 6

**Universal Dynamics**

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting My Site Site Settings Help

Powered By AUTHORIA

**Publishing**

Current Location Manager Advisor Publishing Actions

- Add Listing
- Add Person
- Create Subarea
- Upload Document
- Change Settings
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

1. Choose what you want to publish

Publish All  
 Publish Specific Items

Publish event content

Choose an event type  -ALL-

2. Choose where you want to publish

Authoring Preview  
(Server = <http://evo-2k3-zb791:Area=1>)

**Staging Production**  
(Server = Value not specified; Area = Value not specified)

Publish

3. Get Publishing Status

Get Status

72

68

70

Selected events

Managing a resignation  
Giving a salary increase  
Terminating an employee  
Granting stock options  
Conducting a performance review  
Managing a change in employee status  
Developing a salary plan

Available events

Managing a reduction in force  
Promoting an employee  
Driving performance improvement  
Creating a staffing plan  
Creating a performance improvement plan  
Managing the feedback process  
Onboarding an employee  
Hiring an employee

Publish page views

Choose an event type  Understanding the compensation program

Publish other components

- Publish configuration
- Publish contacts
- Publish employee summary page
- Publish index pages
- Publish manager home page
- Publish pictures
- Publish resources

FIG. 7

The screenshot shows the Universal Dynamics software interface. At the top, there is a navigation bar with links for My Site, Site Settings, Help, Powered By AUTHORIA, and Reporting. Below the navigation bar, there is a search bar with a magnifying glass icon and a link to 'This topic'. The main content area is titled 'Administration' and contains a 'SharePoint administration links' section. This section includes a list of checkboxes for various administrative tasks: Manage users, Manage site groups, Change portal site properties, Manage portal site structure, Configure search and indexing, and Configure usage analysis processing. Below this is a 'Actions' section with checkboxes for Add Listing, Add Person, Create Subarea, Upload Document, Change Settings, Manage Security, and Manage Content. At the bottom of the page, there is a 'Manager Advisor administration links' section with a list of checkboxes for tasks such as Manage Portal Site, Add to My Links, Alert Me, Edit Page, Implementation configuration, Application settings, Trace settings and log, Employee summary schema generator, Compliance tracking reset, Cache refresh, and Authoria customer connection.

FIG. 8

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting

Powered By AUTHORIA

Compliance report

This report lists the events for which compliance is required and specifies which managers have acknowledged reading the event content.

Event Name	Viewer Name	Viewer ID	Time Acknowledged
Creating a staffing plan	Ken Hecht	781530208	3/23/2004 2:38:49 PM
Managing a leave of absence	Ryan Smith	781530207	3/23/2004 2:38:08 PM

Total : 1

Current Location

Manager Advisor Reporting

Compliance report

Actions

Create Subarea

Change Settings

Manage Security

Manage Content

Manage Portal Site

Add to My Links

Alert Me

Edit Page

FIG. 9

**Universal Dynamics** My Site Site Settings Help  
 Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting Powered By AUTHORIA

**Understanding the compensation program** This topic ▾ ▶

**Current Location**

Manager Advisor Reporting Usage reports

**Actions**

Create Subarea Change Settings Manage Security Manage Content Manage Portal Site Add to My Links Alert Me Edit Page

**Hits per day**

Mar 24	Mar 23	Mar 22	Mar 21	Mar 20	Mar 19	Mar 18	Mar 17	Mar 16	Mar 15	Mar 14	Mar 13	Mar 12	Mar 11
2744	2355	1232	178	70	70	771	771	1655	1655	2098	2098	2511	2511

There were a total 22,717 hits on the site's 42 pages.

**Unique users per day**

Mar 24	Mar 23	Mar 22	Mar 21	Mar 20	Mar 19	Mar 18	Mar 17	Mar 16	Mar 15	Mar 14	Mar 13	Mar 12	Mar 11
16	16	12	2	7	11	15	10	14	12	5	4	13	13

22 different people accessed the site

**Detailed hit counts by page**

Area	Mar 24	Mar 23	Mar 22	Mar 21	Mar 20	Mar 19	Mar 18	Mar 17	Mar 16	Mar 15	Mar 14	Mar 13	Mar 12	Mar 11
Authoria Manager Advisor	129	88	122	90	14	275	95	35	42	71	43	11	51	279
Administration	61	70	22	4	1	28	80	11	30	19	29	5	62	177
Authoring	1481	1388	603	62	40	2300	1959	692	620	1111	1635	90	1862	1654
Authoring Help	68	0	0	0	0	0	0	0	0	0	0	0	0	0
Deploy	70	42	11	0	1	20	11	0	6	27	61	2	10	3
Hiring an employee	16	16	3	0	0	2	1	0	0	12	6	0	0	0
Onboarding an employee	10	13	0	0	0	0	1	0	1	7	7	0	2	4
Recruiting an employee	5	0	0	0	0	0	0	0	0	0	0	0	0	0
Setting goals and objectives	11	18	0	0	0	0	0	0	0	4	5	0	3	2
Staffing a position	12	9	0	0	0	0	0	0	0	3	6	0	1	0
Evaluate	29	20	11	0	0	5	10	0	3	15	29	4	8	3
Conducting a performance review	14	7	7	0	0	0	0	0	0	4	6	2	2	0
Creating a career development plan	10	7	0	0	0	0	2	0	0	2	4	0	1	0
Creating a performance improvement plan	11	8	0	0	0	0	2	0	0	3	4	1	1	0
Creating a succession plan	10	7	0	0	0	0	0	0	0	5	4	0	3	0
Managing the feedback process	10	7	0	0	0	0	0	0	0	3	4	0	2	0
Promoting an employee	10	8	0	0	0	0	3	0	0	2	6	0	1	0
Manage	58	37	26	0	0	18	24	1	8	37	35	2	11	3
Driving performance improvement	14	13	2	0	0	3	3	0	2	2	6	0	3	2
Managing a change in employee status	14	7	5	0	0	2	7	0	0	7	0	0	0	0
Managing a complaint	10	10	3	0	0	0	0	0	4	3	6	0	2	0
Managing a leave of absence	19	11	14	0	0	8	6	0	0	2	10	0	3	0
Managing a reduction in force	9	11	2	0	0	0	2	0	0	4	0	0	0	0
Managing a resignation	11	7	0	0	0	0	0	0	0	4	5	0	1	0
Managing attendance	10	10	4	0	0	0	0	0	0	12	5	0	1	0
Managing ongoing performance	12	10	0	0	0	0	0	0	0	7	5	0	0	0
Terminating an employee	13	7	0	0	0	0	0	0	1	4	4	0	0	0
Plan	26	37	18	0	0	0	0	0	0	0	0	0	0	0
Aligning with corporate goals	10	10	0	0	0	0	0	0	0	0	0	0	0	0
Assessing your current organization	12	17	0	0	0	0	0	0	0	0	0	0	0	0
Creating a staffing plan	10	13	0	0	0	0	0	0	0	0	0	0	0	0
Identifying your optimum organization	10	13	0	0	0	0	0	0	0	0	0	0	0	0
Publishing	424	314	193	19	13	277	152	17	29	251	713	15	55	277
Reporting	13	15	75	0	0	54	40	9	9	2	0	1	2	32
Compliance report	8	14	44	0	0	0	0	0	0	0	0	0	0	0
Usage reports	8	9	33	0	0	0	0	0	0	0	0	0	0	0
Reward	35	29	19	3	1	18	36	4	8	20	57	15	8	75
Awarding a bonus	16	25	7	0	0	2	0	0	0	0	0	0	0	0
Developing a salary plan	11	7	3	0	0	1	8	0	0	3	3	0	1	0
Giving a salary increase	12	7	1	0	0	0	1	2	0	3	9	1	1	0
Granting stock options	11	7	1	0	0	0	0	0	0	4	0	0	0	0
Understanding the compensation program	11	7	3	0	0	0	0	0	8	2	4	16	1	0
Totals	2744	2355	1232	178	70	3013	2443	771	771	1655	2711	165	2098	2511

You can copy the above table into Excel for further analysis and archiving. Other notes:

- The server updates this usage data once a day at 1:00 AM.
- Usage data specifically for system storage and network capacity planning can be found on the site collection usage summary page.

82

84

86

FIG. 10

Substitution variables Help

Substitution variables overview

A substitution variable can be used to substitute a value for another value in content that appears on pages. When configuring content, you can use brackets to delineate a variable whose value should be determined using this form. For example; if {employee} is used in content, the system will look for a variable ID named "employee" (case sensitive), and substitute the term in the "Value" column.

Variable id	Description	Value
Company	Substitution variable for the word Company	Company
Companies	Substitution variable for the word Companies	Companies
Company's	Substitution variable for the word Company's	Company's
company	Substitution variable for the word company	company
companies	Substitution variable for the word companies	companies
company's	Substitution variable for the word company's	company's
Company name	Substitution variable for the word Universal Dynamics	Universal Dynamics
Company name's	Substitution variable for the word Universal Dynamics'	Universal Dynamics'
a company	Substitution variable for the phrase a company	a company
Department	Substitution variable for the word Department	Department
Departments	Substitution variable for the word Departments	Departments
Departments'	Substitution variable for the word Department'	Departments'
Department's	Substitution variable for the word Department's	Department's
Departmental	Substitution variable for the word Departmental	Departmental
department	Substitution variable for the word department	department
departments	Substitution variable for the word departments	departments
department's	Substitution variable for the word department's	department's
departments'	Substitution variable for the word departments'	departments'
departmental	Substitution variable for the word departmental	departmental
a departmental	Substitution variable for the phrase a departmental	a departmental
Employee	Substitution variable for the word Employee	Employee
Employees	Substitution variable for the word Employees	Employees
Employee's	Substitution variable for the word Employee's	Employee's
employee	Substitution variable for the word employee	employee
employees	Substitution variable for the word employees	employees
employee's	Substitution variable for the word employee's	employee's
employees'	Substitution variable for the word employees'	employees'
An employee	Substitution variable for the phrase An employee	An employee
an employee	Substitution variable for the phrase an employee	an employee
an employee's	Substitution variable for the phrase an employee's	an employee's
Career management system	Substitution variable for the phrase Career management system	Career management system
Compensation management system	Substitution variable for the phrase Compensation management system	Compensation management system
Human Resources management system	Substitution variable for the phrase Human Resources management system	Human Resources management system
Performance management system	Substitution variable for the phrase Performance management system	Performance management system
Staffing management system	Substitution variable for the phrase Staffing management system	Staffing management system
Time and absence management system	Substitution variable for the phrase Time and absence management system	Time and absence management system
Highlights	Substitution variable for the text of the Highlights tab	Highlights
Actions	Substitution variable for the text of the Actions tab	Actions
Tips	Substitution variable for the text of the Tips tab	Tips
Company philosophy	Substitution variable for the text of the Company philosophy section header	Company philosophy
Policy snapshot	Substitution variable for the text of the Policy snapshot section header	Policy snapshot
Manager's role	Substitution variable for the text of the Manager's role section header	Manager's role
Legal considerations	Substitution variable for the text of the Legal considerations section header	Legal considerations
Preparation	Substitution variable for the text of the Preparation section header	Preparation
Milestones	Substitution variable for the text of the Milestones section header	Milestones
Tools	Substitution variable for the text of the Tools section header	Tools
Tasks	Substitution variable for the text of the Tasks section header	Tasks

FIG. 11

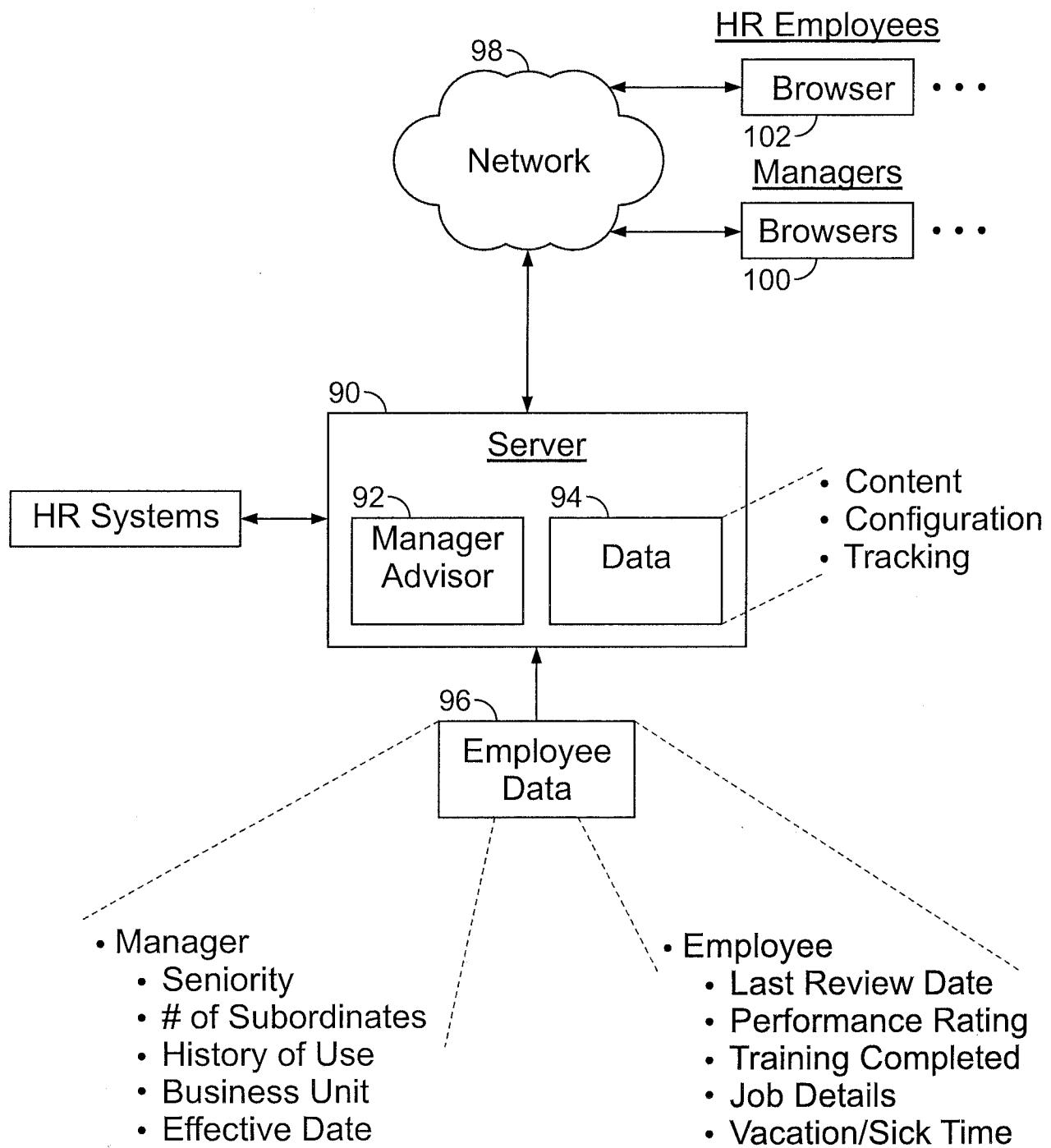


FIG. 12